

NASBA Subject Area Recommendations for Accountant CPE Credit

71st Annual Employee Benefits Conference

November 9-12, 2025 | Honolulu, Hawaii

The International Foundation of Employee Benefit Plans is registered with the National Association of State Boards of Accountancy (NASBA) as a sponsor of continuing professional education on the National Registry of CPE Sponsors. State boards of accountancy have final authority on the acceptance of individual courses for CPE credit. Complaints regarding registered sponsors may be addressed to the National Registry of CPE Sponsors through its website: www.nasbaregistry.org.

The International Foundation has been approved for group-live programs. In accordance with the standards of the National Registry of CPE Sponsors, CPE credits have been granted based on a 50-minute hour. (Note: Regulations for your state may preclude reporting credit in half-hour increments.) This is a group-live instructional course and is an update for CPAs regarding topical concerns in the employee benefits field.

All sessions offered may apply toward the Specialized Knowledge and Applications category of credit.

Sessions listed below qualify under the specialized topic noted:

<u>Session Title</u>	<u>Session Date and Time</u>	<u>Amount and Type of Credit</u>
OPENING SESSION—Overcoming Adversity	Sunday, November 9 – 4:30-6:00 p.m.	1.0 Personal Development
KEYNOTE SESSION—Get Big Things Done: The Power of Connectional Intelligence	Monday, November 10 – 7:30-8:45 a.m.	1.0 Personal Development
A01 – Talent Wars: Where Do We Find Our Next Administrator?	Monday, November 10 – 9:15-10:15 a.m. <u>OR</u> Tuesday, November 11 – 2:45-3:45 p.m.	1.0 Personnel/Human Resources
F01 – Fiduciary Responsibility Basics	Monday, November 10 – 9:15-10:15 a.m. <u>OR</u> Tuesday, November 11 – 2:45-3:45 p.m.	1.0 Business Law
G06 – FEATURED SESSION—The Impact of Artificial Intelligence on Benefits	Monday, November 10 – 9:15-10:15 a.m. <u>OR</u> Tuesday, November 11 – 1:15-2:15 p.m.	1.0 Information Technology
G08 – Communicating With Plan Participants—Case Study Examples of Success	Monday, November 10 – 9:15-10:15 a.m. <u>OR</u> Tuesday, November 11 – 1:15-2:15 p.m.	1.0 Communications and Marketing
G18 – Updates in Benefits Litigation	Monday, November 10 – 9:15-10:15 a.m.	1.0 Business Law
I17 – How Artificial Intelligence Is Disrupting Markets and Reshaping the Investment Industry	Monday, November 10 – 9:15-10:15 a.m. <u>OR</u> Tuesday, November 11 – 10:45-11:45 a.m.	1.0 Information Technology
P07 – Department of Labor (DOL) Retirement Plan Audit Trends	Monday, November 10 – 9:15-10:15 a.m. <u>OR</u> Wednesday, November 12 – 9:00-10:00 a.m.	1.0 Business Law
PE1 – Public Sector Legislative and Regulatory Update	Monday, November 10 – 9:15-10:15 a.m.	1.0 Business Law
P-ACCT1 – Accountants: Accounting and Auditing—Key Updates and Insights for 2025	Monday, November 10 – 9:15-10:15 a.m.	0.5 Accounting and 0.5 Auditing
A02 – Work-Life Balance—Keeping Grounded in Times of Uncertainty	Monday, November 10 – 10:45-11:45 a.m. <u>OR</u> Tuesday, November 11 – 1:15-2:15 p.m.	1.0 Personal Development
F02 – Best Practices in Trustee Processes and Oversight	Monday, November 10 – 10:45-11:45 a.m. <u>OR</u> Tuesday, November 11 – 1:15-2:15 p.m.	1.0 Business Law
G09 – Cybersecurity Benefits Update	Monday, November 10 – 10:45-11:45 a.m. <u>OR</u> Tuesday, November 11 – 2:45-3:45 p.m.	1.0 Information Technology
H02 – Health Care Legal and Legislative Update	Monday, November 10 – 10:45-11:45 a.m. <u>OR</u> Tuesday, November 11 – 1:15-2:15 p.m.	1.0 Business Law
P03 – Advanced Withdrawal Liability Topics	Monday, November 10 – 10:45-11:45 a.m. <u>OR</u> Tuesday, November 11 – 2:45-3:45 p.m.	1.0 Business Law
P08 – Effectively Communicating Your Pension/Retirement Plans	Monday, November 10 – 10:45-11:45 a.m. <u>OR</u> Tuesday, November 11 – 2:45-3:45 p.m.	1.0 Communications and Marketing
P-ACCT2 – Accountants: Understanding the Tax Implications of Investments	Monday, November 10 – 10:45-11:45 a.m.	1.0 Accounting
P-ATTY1 – Attorneys: Changes to the Legal Landscape Impacting Employee Benefit Plans	Monday, November 10 – 10:45-11:45 a.m.	1.0 Business Law

OVER

<u>Session Title</u>	<u>Session Date and Time</u>	<u>Amount and Type of Credit</u>
F10 – Cybersecurity—It’s Okay to Spend Money to Protect Member Data	Monday, November 10 – 1:15-2:15 p.m. <u>OR</u> Tuesday, November 11 – 2:45-3:45 p.m.	1.0 Information Technology
G05 – Benefit Plan Audits	Monday, November 10 – 1:15-2:15 p.m. <u>OR</u> Tuesday, November 11 – 1:15-2:15 p.m.	1.0 Auditing
G11 – You’ve Been Summoned—Best Practices in Litigation, Depositions and Trial Testimony	Monday, November 10 – 1:15-2:15 p.m.	1.0 Business Law
P01 – Legal and Legislative Update for Retirement Plans	Monday, November 10 – 1:15-2:15 p.m. <u>OR</u> Tuesday, November 11 – 2:45-3:45 p.m.	1.0 Business Law
P-ATTY2 – Attorneys: Ethical Considerations	Monday, November 10 – 1:15-2:15 p.m.	1.0 Behavioral Ethics
T03 – Emerging Technologies in Using Artificial Intelligence in Your Apprenticeship Programs	Monday, November 10 – 1:15-2:15 p.m.	1.0 Information Technology
F04 – Wearing the Right Hat at the Right Time—The Two-Hat Dilemma	Monday, November 10 – 2:45-3:45 p.m. <u>OR</u> Tuesday, November 11 – 10:45-11:45 a.m.	1.0 Business Law
F12 – Fiduciary Responsibilities in a Defined Contribution Plan	Monday, November 10 – 2:45-3:45 p.m. <u>OR</u> Tuesday, November 11 – 2:45-3:45 p.m.	1.0 Business Law
H15 – Health Plan Cybersecurity Update	Monday, November 10 – 2:45-3:45 p.m. <u>OR</u> Wednesday, November 12 – 7:30-8:30 a.m.	1.0 Information Technology
P-ACCT4 – Accountants: Why Does Audit Planning Matter?	Monday, November 10 – 2:45-3:45 p.m.	1.0 Auditing
P-ATTY3 – Attorneys: Lessons Learned From Current DOL Investigations	Monday, November 10 – 2:45-3:45 p.m.	1.0 Business Law
T04 – Personal Leadership Skills for Stronger Apprenticeship Programs	Monday, November 10 – 2:45-3:45 p.m.	1.0 Personal Development
KEYNOTE SESSION: Economic Update	Tuesday, November 11 – 7:30-8:45 a.m.	1.0 Economics
F05 – Trustee Expenses	Tuesday, November 11 – 9:15-10:15 a.m. <u>OR</u> Wednesday, November 12 – 7:30-8:30 a.m.	1.0 Business Law
G01 – U.S. Legislative Update	Tuesday, November 11 – 9:15-10:15 a.m.	1.0 Business Law
G19 – Better Communication Makes for a Better Audit	Tuesday, November 11 – 9:15-10:15 a.m. <u>OR</u> Wednesday, November 12 – 7:30-8:30 a.m.	1.0 Accounting
H14 – Practical Uses for Artificial Intelligence in Health Plans	Tuesday, November 11 – 9:15-10:15 a.m. <u>OR</u> Wednesday, November 12 – 7:30-8:30 a.m.	1.0 Information Technology
P-ACCT5 – Accountants: Best Practices	Tuesday, November 11 – 9:15-10:15 a.m.	0.5 Accounting and 0.5 Auditing
P-ATTY4 – Attorneys: Employee Benefits Fiduciary Litigation Update	Tuesday, November 11 – 9:15-10:15 a.m.	1.0 Business Law
G16 – Beyond the Payroll Audit—Impact on Financial Statements	Tuesday, November 11 – 10:45-11:45 a.m. <u>OR</u> Wednesday, November 12 – 9:00-10:00 a.m.	1.0 Accounting
P-ACCT3 – Accountants: Building the Audit Team	Tuesday, November 11 – 10:45-11:45 a.m.	1.0 Personnel/Human Resources
T06 – Fiduciary Responsibility in Your Apprenticeship Programs	Tuesday, November 11 – 10:45-11:45 a.m.	1.0 Business Law
P-ATTY5 – Attorneys: Benefit Plan Mergers	Tuesday, November 11 – 1:15-2:15 p.m.	1.0 Business Law
P-ATTY6 – Attorneys: Your Role in the Plan Investment Process	Tuesday, November 11 – 2:45-3:45 p.m.	1.0 Business Law
FINALE SESSION—Red Shoes Living, Igniting Human Potential	Wednesday, November 12 – 10:30-11:30 a.m.	1.0 Personal Development

Total CPE Instruction (14 sessions) = 14.0 Credits

**Submit one completed continuing education form per session attended. Badge scanning does NOT qualify for CE credit.
Per NASBA Regulations, forms are only accepted as you leave the room at the conclusion of each session.**